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Market Development Reports

Private Label Grocery Opportunities

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Report Highlights:

Canada has built a solid reputation as an excellent source for private label food products. Perhaps the best opportunities for U.S. product exist with regional independent grocery chains with little or no private label products, with manufacturers' that produce private label currently or focusing on categories that have potential growth. U.S. exporters wishing to capitalize on the opportunities, that private label programs offer, should base their market entry strategies on quality research.

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REPORT SUMMARY:

Canada has built a solid reputation as an excellent source for private label food products. Canada's prowess in private label is a result of our flexibility to adapt quickly to food trends and provide the quality consumers demand today. Private label manufactures know Canadian consumers are educated about their food choices and demand a high quality product that has resulted in the delivery of low cost, innovative, unique and great tasting, products that are equal or better than the national brands. Sales of private label products continue to grow, as the Canadian retailers vie for position as a result of consolidation. Consumers have fewer supermarket choices and smart retailers are creating store loyalty with private label. Perhaps the best opportunities exist with regional independent grocery chains with little or no private label products, with manufactures' that produce private label currently or focusing on categories that have potential growth. U.S. exporters wishing to capitalize on the opportunities, that private label programs offer, should base their market entry strategies on quality research.

INTRODUCTION

Private labels or store brands are an important source of profits for retailers and a formidable source of competition for national brands. A strong private label program gives retailers higher margins, more leverage to lower costs and creates opportunity for customer loyalty.

DEFINITION

Private label refers to a brand sponsored by a wholesaler or retailer. A private brand, on the other hand, bears the name of a manufacturer or producer. Since manufacturers' brands have large advertising expenditures built into their costs, a private labeller is able to sell the same goods at a lower price or better profit margin. Advertising budgets are directed towards brand identity not individual products. In addition, private labellers have more control over pricing and are able to advantageously display their own brands for maximum impact. For example, a grocery store can quickly reduce the price of its own private-label brand in order to meet or beat a competitor's price. As well, the grocery store can create a special point-of-purchase advertising display and/or give its brand predominant shelf space in order to boost sales. Private label brands are usually priced lower than comparable manufacturers' brands and therefore appeal to bargain conscious consumers. An example of a private label brand would be supermarket products bearing a store label with a product name i.e. Loblaw's *Presidents' Choice* Decadent Chocolate Chip Cookies.

HISTORY OF PRIVATE LABEL

Private label products can be documented throughout history, stretching as far back as the 19th century. A&P was started early in the 1860s, evolving into a retail business from its expertise in importing and wholesaling teas plus grinding coffees in its stores. *Eight O'Clock* Coffee and *Our Own* Tea were two of its first private label grocery items. Both are still on the shelf. In recent history, two important influences have helped to shape private label. The 1970s brought a change in retailers' attitudes with the introduction of generic products. Generics have been credited with giving retailers the opportunity to rethink shelf allocation and warehouse arrangements. Retailers realized that they could change the way they promote the grocery department. They were no longer required to invest their margins on branded items to maintain category velocity. With generic private label products, they could offer consumers a real alternative from the national brands that their customers understood, responded to and wanted.¹

Closely tied to this development was the European influence on Canadian retailing and wholesaling. Stores like Sainsbury's and Marks and Spencer have been practicing the advantages of private label retailing for several decades in the U.K. The aura surrounding the private label products provided by these two retailers is unsurpassed anywhere in the world. During the 50's, 60's and 70's the majority of immigrants to Canada were from Britain and with them they brought their trust, loyalty and high regard for private label products. You could say in Canada we're preaching to the converted.

The Canadian retail grocery chain Loblaw's capitalized on this trend in the early 1980s. At this time, Loblaw's had a limited private label program. Loblaw's introduced "No Name" generic products as their private label strategy. This enabled Loblaw's to differentiate themselves from their competitors. Loblaw's knew that the European retailers had capitalized on a strategy of creating unique families of products, available only at their

¹ Cornell University Staff, Philip Fitzell and Mark Konick, The Explosive Growth of Private Label In North America 1998.

stores. This program became so successful that in 1985, Loblaw's introduced its *Presidents Choice* private label. The products offered are of high quality, unique in offerings, and embody exotic tastes and flavours. The packaging is anything but generic. They are colourful and explosive in their images, providing shoppers with a form of marketing entertainment. Capturing the essence of each product and establishing an identity enables private label products like these to compete head-to-head with the national brands.

SITUATIONAL ANALYSIS

Canadian Consumer

In order to successfully enter and compete in the Canadian market, U.S. exporters must first understand all aspects of the Canadian marketplace and its consumers. Today's more educated, less brand loyal consumer shops for value first. Value that can be equated to customer alignment, relevant quality, convenience, added benefit and fair price are important factors that must be accounted for.

Top Ten Traits of Today's Canadian Consumer:²

1. Far less homogenous, culturally bound
2. Independent thinkers who seek control over their lives
3. More educated and sophisticated
4. 51% of woman and 42% of men have post-secondary education
5. Pursuers of higher quality of life
6. Extremely demanding
7. Optimistic, but well grounded in reality
8. Seekers of new experiences and innovation
9. Pursuers of wellness and environmentalism
10. Ageing, but more active

Having knowledge of the Canadian consumer psyche will enable potential U.S. exporters to understand the factors for food choices made by Canadians.

² "Speaking of Food and Eating – A Consumer Perspective," The Canadian Foundation for Dietetic Research, Dietitians of Canada and Kraft Canada.

Important Factors for Food Choices³

Taste	93%
Nutrition & Health	89%
Ease of Preparation	68%
Preparation Time	66%
Price	62%
Weight Control	55%

By understanding what products Canadian consumers purchase, U.S. exporters can identify potential areas for private label category growth.

Grocery Cart Share⁴

Meat	23%	Dairy	16%
Nuts & Produce	20%	Beverages	5%
Dry Goods	18%	Fish Products	3%
Bakery & Cereal	16%		

By better understanding Canadian consumer behavior and trends, U.S. exporters can position themselves to capitalize on the opportunities private label programs offer.

The following categories offer what Canadian consumers view as exciting.

What's Hot in Grocery Stores?

Speciality cured meats/sausages

Fresh/frozen salmon

Speciality milks

Grated cheese

Speciality (ethnic) baked goods

Cereal-based snack foods

Rice (including mixes)

Single-Strength fruit juices

Ethnic fruits and vegetables

Pre-cooked frozen foods

Non-alcoholic beverages (water)

Ethnic sauces

Olive Oils

SOURCE *Agriculture and Agri-Food Canada's 1999
Canadian Consumer Food Buying Trends report*

³ "Speaking of Food and Eating – A Consumer Perspective," The Canadian Foundation for Dietetic Research, Dietitians of Canada and Kraft Canada.

⁴ "Speaking of Food and Eating – A Consumer Perspective," The Canadian Foundation for Dietetic Research, Dietitians of Canada and Kraft Canada.

EASTERN CANADIAN RETAILERS

The sentiment within the supermarket industry is that private label is growing. Competition, consolidation and an increase in efficiencies of scale have brought about an even greater need for stores to differentiate themselves. By selling their own private label products, stores are able to stand out from their competitors.

In recent year's Canadian retail supermarket chains have aggressively restructured themselves within the marketplace. Not only have they increased their market share, they have simultaneously introduced sophisticated and well-developed private label programs.

As the Canadian supermarket industry consolidates with larger chains merging to save costs, more shelf-space is likely to end up with private labels right next to the national brands. Retail consolidation has had the effect of concentrating the market share with a minority of large grocery retail outlets. In the U.S. the top five grocery firms account for approximately 45% of all U.S. grocery sales. In Canada the top five account for 70% of traditional grocery sales and 58% of all grocery sales at retail. With such few players in the country, all with established private label programs, it may suggest that the Canadian private label marketplace is saturated.

Major Canadian Grocery Chains in Eastern Canada

Chain	Contact	# of Corporate Stores	# of Franchised Stores	# of Private Label Products	Private Label
Loblaw Company Ltd.	Boris Polakow	781	1078	6300	Presidents Choice , No Name, G.R.E.E.N., Sunspun, Teddy's Choice
Sobeys Inc.	Dominic Duronio	265	943	3100	Our Compliments, Smart Choice
Métro-Richelieu	Robert Comeau	35	1038	1000*	Metro, Super C, Marche, Richelieu, Econochoix
Great Atlantic & Pacific Co.	Dave Spry	176	57	2250+	Master Choice, Equality

Source: Canadian Grocer Magazine, "Who's Who-Annual Directory 1999-2000."

* Métro-Richelieu Corporate Affairs

+ Great Atlantic & Pacific Co. Corporate Affairs

See Appendix 1 for full contact listing

Retailers in Canada have a large pool of private label manufactures to choose from with extensive expertise in the field. And as more consumer brand product companies enter the private label business penetrating that segment of the market may prove difficult, but not impossible.

Matching up with regional independent grocery chains may prove to be an excellent opportunity for U.S. exporters. Having fewer private label products or none at all, these regional independent grocery chains may provide an opportunity for entry or expansion of existing private label programs/products.

Regional Independent Grocery Retail Chains In Eastern Canada

Chain	Contact	# of Stores	# of Private Label Products/SKUS	Private Label
Longo Bros. Fruit Market Inc.	Jenny Longo	10	175	Longo's Own
Lanzarotta Wholesale	Frank Rooke	6	120 SKUS	Our Very Own
L&M Food Markets Ltd.	Dale Krops	8	*2000	L&M, Smart Choice, Our Compliments
Coleman's Food Centres	Shawn Hollett	12	+N/A	No private label program in place
Highland Farms	Charlie Coppa	4	N/A	No private label program in place
Knob Hill Farms	No longer in business	9	N/A	No private label program in place

Source: Canadian Grocer Magazine, "Who's Who-Annual Directory 1999-2000."

* Susan Turner-L&M Food Markets Ltd.

+ Bonnie Whalen-Coleman Foods Ltd.

See Appendix 1 for full contact listing

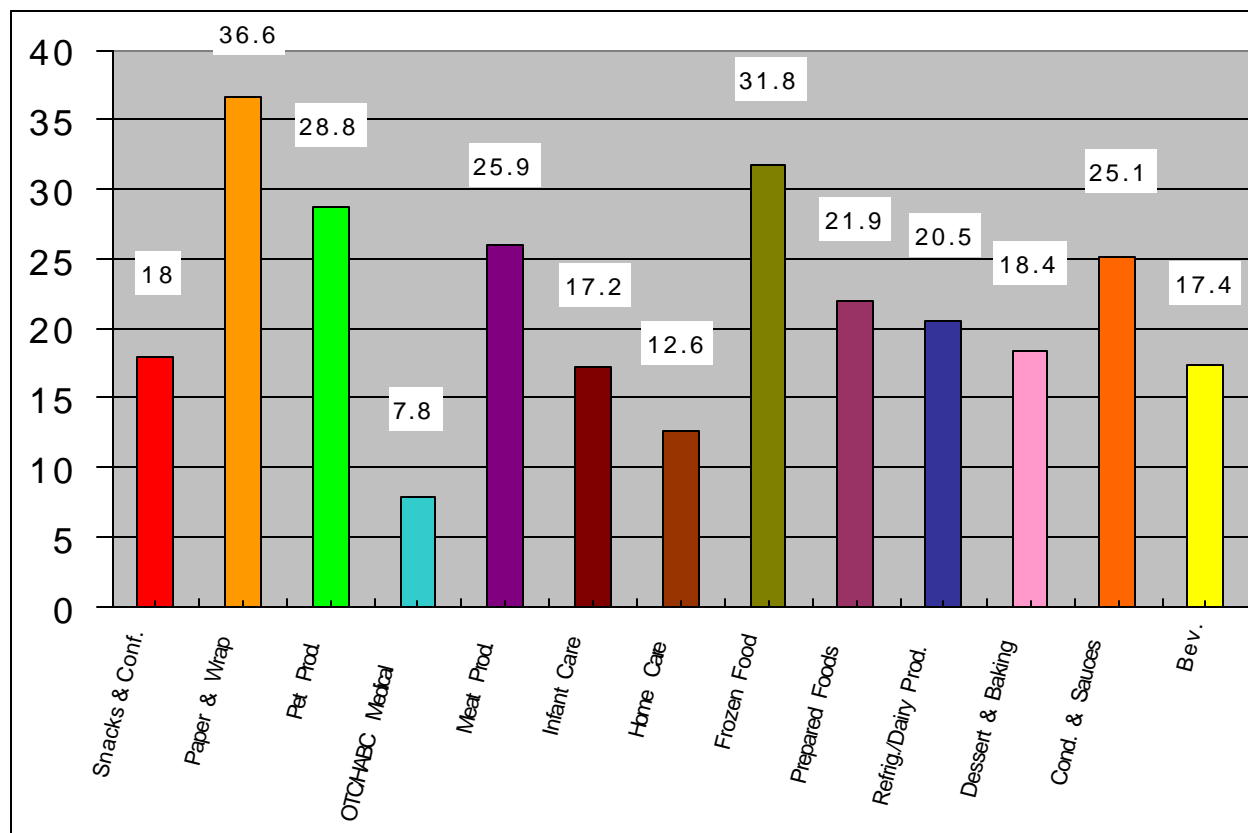
PRIVATE LABEL CATEGORIES

Private Labels on the Rise

Private labels, in effect, are becoming more like brands. The dictionary defines a brand as a "sign of quality" or "a proof of ownership," which could apply as easily to many private label. Rarely do private label products enjoy a level of promotions comparable to that of brand names, so they rarely enjoy the same level of consumer loyalty. But as manufactures add words like premium, choice, special, gourmet, or even private label itself and charge prices comparable to name brands, it becomes increasingly difficult for the consumer to distinguish between a national brand and a stores private label. Often but not always the name brand wins out based on historical consumer tendency and loyalty. For example, when offered a choice of colas, a national brand like Coke or a private label like *Presidents Choice*, the consumer tendency will be to choose a Coke. However, when sampled, often there is no difference in quality or taste and despite this level of loyalty, private labels and house brands are on the rise.

Store Brands Share/Growth of Grouping National Total Grocery-Dollars-52 Weeks to January 2, 1999

Store Brands Share



Rate of Growth

	Snacks & Conf.	Paper & Wrap	Pet Prod.	OTC/HABC Medical	Meat Prod.	Infant Care	Home Care	Frozen Food	Prepared Foods	Refrig./Dairy Prod.	Dessert & Baking	Cond. & Sauces	Bev.
Store Brand Growth	7	11	6	19	-1	15	15	13	6	11	13	12	4
Total Grouping Growth	5	3	2	10	0	0	7	0	3	6	5	4	7

Groupings include all categories, including categories without store brand entry
Source: AC Nielsen

Among the categories illustrated, significant store brand share was realized in paper and wrap (36.6%), frozen foods (31.8%), pet food (28.8%), meat products (25.9%), and condiments and sauces (25.1%).

Paper and wrap (7%), frozen foods (13%), pet food (6%), meat products (-1%) and condiments and sauces (12%) represents the store brand growth in that category. 3%, 0%, 2%, 0% and 4% respectively, represents the growth of the total category, which includes manufactures brands and private label. Therefore, with the exception of meat products, store brand (private label) number of units are growing at a faster rate than the national brand for paper and wrap, frozen foods, pet foods, and condiments and sauces. These five categories could prove to be excellent opportunities for U.S. suppliers of raw materials to partner with Canadian private label manufactures.

A recent AC Nielsen study, International Private Label Retailing: Indicators and Trends, supports the continuing growth in these categories. It found that private label products continue to gain share against top name brand products. Private label products are no longer viewed as less expensive and lower quality alternatives to the national brands. As retailers introduce more quality private label products, that are able to compete with the popular national brands, the production of private label products will continue to be a dynamic part of food retailing in Canada.

**Private Label Share
Canada's Food & Drink Categories**

	Value Basis		Volume Basis	
	'98	+/- points vs. '97	'98	+/- points vs. '97
Total	19.3	+1.1	25.5	+1.3
Food categories	21.5	+0.9	26.8	+1.0
Drink categories	20.1	+0.5	27.7	+0.2
Personal care categories	11.2	+1.0	18.3	+1.6
Household categories	25.1	+1.8	30.8	+1.7

Source: AC Nielsen

The AC Nielsen study suggests that among product categories, penetration of private label continued to be high in household items, which includes paper products, detergents, plastic food wraps and bags. The highest penetration of all the categories studied, 37%, was recorded in aluminium foil and plastic wraps. The lowest penetration was observed in personal care products, especially in such categories as deodorants, shampoo and toothpaste, each of which had a private label, share of 5% or less. These findings are not surprising, given that most consumers view household products as more of an impersonal necessity, whereas great care is often taken when choosing a product as personal as deodorant.

What may be surprising is the high degree of penetration that private label products enjoy in the food category. Among the four broad categories studied, food, drinks, personal care and household products, food had a private label penetration of 16%, second only to household products with 18%.

Within food, private labels enjoyed the highest penetration in frozen potato fries (34.5%), bottled and canned vegetables (32.5%), jams, jellies and marmalade (32.4%), and packaged rice (29.7%).

Canada's food and drink categories suggest healthy growth within the groupings and potential for increased expansion.

PRIVATE LABEL VS BRANDS

Although private label has been a success story in Canada, one retailer realizes more success in this area than its competitors. In Canada, Loblaw's is clearly the leader in private label products within the supermarket industry. Private label products account for approximately 42% of Loblaw's sales. This level of success is not enjoyed by other retailers. Even the larger Canadian chains like A&P and Sobey's have yet to experience the same level of success. Their private label products account for roughly 20% of sales.

Dominion Bond Rating Services Limited reports that private label brands represent 23% of annual supermarket sales in Canada last year, which trails only Britain (29%) in market penetration. Stores realize the importance of increasing their private label market share but at what expense. The cost associated with increasing private label sales may be more than the store can afford to invest, either in expertise, labour cost, or advertising.

The average gross margin for national brands is 17%. If a store chooses not to stock any private label products in a certain category, they can expect margins of 17%.

In comparison, the margins on private label products average 40%, but even if a store was able to boost its private label penetration to 20%, the category's gross margin would still amount to just 21.6%.⁵

Item Retail Comparison

	National Brand	Private Label
Retail	\$5.99	\$3.99
Cost	\$4.97	\$2.39
Profit	\$1.02	\$1.60
Profit %	17%	40%

Source: Tom Stephens, Brand Strategy Consultants

⁵ "Former Presidents Choice Executive Offers His Views on Private Label," Canadian Grocer July 1995: 6.

Category Profitability Gross Margin %

P/L Penetration %	Gross Margin %
0%	17%
5%	18.2%
10%	19.3%
15%	20.5%
20%	21.6%

Source: Tom Stephens, Brand Strategy Consultants

Introducing private label products, to realize better margins, may not be the best solution for all retailers. However, as the market penetration of private label products grows, so will the need for stores to offer private label as part of their product mix.

Product Margin Analysis

Increasingly grocery retailers have gone from being the distributors of brands to showcasing their own private labels. Retailers investing heavily in raising their profiles, sharpening their images and taking advantage of that imagery with heavily promoted private label products, will further blur the lines between retailers and the products they sell. If a store has quality products and can effectively price its private label products against the leading national brands, the store will almost certainly realize better margins through its private label products.

Loblaws is one Canadian retailer who most exemplifies this. Its President's Choice products offer a better quality than the national brands, but at a lower price. In the category of peanut butter, they're "No Name" brand is the leading product, taking 15% of sales, while Kraft is the leading national brand.⁶

Pay \$3.16 for Kraft	Retail Kraft for	\$2.99	(.17)
Pay \$1.82 for No Name	Retail No Name for	\$2.89	\$1.07

Presidents Choice brand peanut butter retails at \$3.99. Cost on the product is \$2.11 allowing Loblaws to realize a margin of \$1.88 per unit. As the entire peanut butter category has made a collective profit of \$2.95 per unit, this retailer can rationalise a loss of 17 cents on the national brand (Kraft). This is category management at its finest. As well, the "lost leader" strategy on a national brand, brings the consumer into the store to buy Kraft peanut butter, for far less than the competition can afford to sell the product. Once the consumer is in the store, Loblaws has the advantage to capitalize on the consumer's regular and impulse purchases.

A strong private label program with a good product mix, gives the retailers higher margins, more leverage to lower costs, and creates customer loyalty. These three factors and its' substantial market share have contributed significantly to the success of Loblaw's private label program.

⁶ Cornell University Staff, Philip Fitzell and Mark Konick, The Explosive Growth of Private Label In North America 1998.

ADVANTAGES OF PRIVATE LABEL

A retailer that incorporates the private label into the store's offerings enjoys specific advantages.

- Retailers of private label products are able to take advantage of the advertising and marketing provided by the manufactures of national brands. Drawing consumers to the store and allowing point-of-purchase decisions to be made on price or simply presence.
- Private label owners may occasionally sell their own label products to non-competitive retailers or wholesalers, in markets where they do not operate stores. This licensing arrangement is practised by Loblaws and A&P.
- Once private label has established consumer loyalty to the store and store brand, the store has the ability to introduce new private label products and is rewarded automatically by consumers who make those new category purchases.
- Retailers control their own store brands. They have the ability to cut prices, change ingredients and/or determine the level of quality.
- Private label builds store identity. Products that carry manufacturers' brands can be found in nearby stores. In a sense, a store that promotes national brands is promoting those same products for its competitors. This is not the case for private label. They are exclusive to the store.
- Goods carrying a private label can not be easily "comparison shopped" by consumers.
- A brand that has built a successful following of satisfied consumers can eventually support a better than average mark up to the company that controls the private label. When the brand is private label, the additional margin goes to the store rather than to the manufacturer.
- Major retailers, whose gross sales are sufficient to support a production facility, are able to increase their profits by adding the manufacturing profits to their bottom line. A&P for example maintains canning plants to supply its stores.
- In cases where the merchandise is private labelled and bought from independent manufactures, the cost of the manufacturing is reduced due to increased raw product volume discounts.
- Manufactures are not required to support promotion costs on products they produce for private label. Both retailer and manufacture benefit.

Opportunities and Challenges in Providing Canada With Private Label Products

Opportunity	Challenges
There are four large firms to deal with that have representation right across Canada.	Oligopoly like structure, fewer firms makes penetration of the market more difficult
Partnering with Canadian manufactures and acquiring knowledge from their expertise in private label.	Canadian manufactures may want concessions for partnerships, may feel U.S. exporters have limited or no contribution
A food processor may enjoy a partnership with a private label retailer as a partially or entirely owned subsidiary.	Finding an opportunity for a merger/acquisition may prove difficult, as company cultures may differ severely.
U.S. growers, shippers/packers of raw materials may team up with private label manufactures to produce private label products sold to Canadian retailers. I.e. tomato grower may supply H.J. Heinz who produces private label salsa for Canadian retailer.	Food processor/manufacture may source local products cheaper and eliminate shipping charges entirely.
Teaming up with regional independent grocery chains that have few private label products or no private label program.	U.S. private label manufactures must offer products that are unique, of high quality and a low cost. They must understand the financial demographics, issues and opportunities for that particular independent.
Private label products are contributing to the growth of sales for the Canadian grocery retail sector.	Understanding both Canadian consumer and retailer demands is more important than producing “me too” products.
Research of the social, economic and political elements that effect private label will assist in the development of a strong strategic entry for U.S. exporters into the Canadian marketplace.	Understanding a vital application of quality research can be costly and time consuming.

Resources

AC Nielsen Web Site, www.acnielsen.com

Agriculture and Agri-Food Canada Web Site, www.agr.ca

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Nesbitt Burns Web Site, www.bmonesbittburns.com

Statistics Canada Web Site, www.statcan.ca

"Speaking of Food and Eating – A Consumer Perspective." The Canadian Foundation for Dietetic Research, Dieticians of Canada and Kraft Canada.

United States Department of Agriculture Web Site, www.usda.gov

U.S. exporters wishing to capitalize on the opportunities that private label programs offer, should base their strategies on research. Research leads to tactics that are effective.

RETAIL CONTACTS

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CA0001	Eastern Canada Retail Study	1/05/00
CA0004	Bakery Products I: Sweets	1/20/00
CA0006	Bakery Products II: Bread, Rolls, etc.	1/24/00
CA0007	Food Product Export Opportunities in Eastern Canada	1/31/00
CA0022	New England Culinary Institute	2/29/00
CA0030	WUSATA Recruits Grocery Showcase West	3/21/00
CA0032	Agent/Distributor Directory -Eastern Canada	3/21/00
CA0047	Hotel, Restaurant, Institutional Foodservice Sector Report - Eastern Canada	4/19/00
CA0050	Agent/Broker Directory - Western Canada	4/19/00
CA0081	Food Product Export Opportunities in Eastern Canada - Report II	6/20/00
CA0082	Canada Connect (Matchmaker Program)	6/26/00
CA0112	Wine & Spirits Promotional Opportunities	8/9/00
CA0113	Food & Beverage Promotional Opportunities	8/9/00
CA0114	Livestock Promotional Opportunities	8/9/00

CA0115	Pet Show Promotional Opportunities	8/9/00
CA0116	Poultry Show Promotional Opportunities	8/9/00
CA0117	Nursery Product Promotional Opportunities	8/9/00
CA0118	Wood Product Promotional Opportunities	8/9/00
CA0127	HRI Foodservice Sector - Western Canada	8/25/00
CA0135	Private Label Grocery Opportunities	9/11/00